Horizon
Intermediate Cataloging

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Intermediate Cataloging

Intermediate Cataloging builds upon the training you received in the Cataloging Basics course. To take full advantage of this training, you should have a basic understanding of the Cataloging module by having completed the Cataloging Basics course. You might have difficulty with this training unless you have fulfilled the earlier training as mentioned.

The first section of this manual provides a review of basic Horizon tasks. If you do not need a review of basic tasks, skip directly into the section on Payments and Blocks.

You will learn about these topics in this manual:

- Horizon review
- Bib records
- Authority records
- Item Records
- Workforms
- Reports

Horizon Review

In This Section Learn About:

This section provides an overview of basic Horizon skills. You may feel like you already know this material well enough to skip ahead to the next section.

•	Horizon login
•	Launcher navigation
•	Dynamic menus
•	Searching

If you are new to Horizon, or if you have not had much time to use your Horizon system, this section gives you the opportunity to review many of the basic skill sets that you will need.

The searching section of this manual provides you with limited information about using staffPAC searching to locate records in your database. If you need a more in-depth review of searching procedures, you will likely want to access the Dynix website and download the more a more-detailed training document that covers searching.

Logging into Horizon

You log into Horizon by double clicking on the Horizon icon on your computer desktop. This action launches the Horizon executable. Before you can actually get into Horizon you must supply your login and password information.

Follow these steps to log into Horizon:

1. Double click on the Horizon icon on your computer desktop. Horizon displays the Horizon login screen:

2. Enter your User ID in the User field.

3. Enter your password in the Password field.

> Your system administrator can give you your User ID and password. If you are logging into a training database (instead of your live Horizon database) you may need to use a different User ID and password.

> Horizon remembers your Server and Database settings. If you lose these settings due to an electrical surge or other unexpected event, you will need your system administrator to supply the database login and password before you can log into Horizon.

Once you have entered in your password, the **Options** button becomes highlighted. The **Options** button allows you to choose such things as the location you are going to log into and the font you are going to use. These defaults are set on the training database so you do not have to set

them each time you log in. However, if you want to change them you can do so.

4. If you want to change your login options, click **Options**. Otherwise, skip to Step 6.

5. You can change these options:

   - The location you want to log into.
   - The default owner.
   - The language.
   - The font you want to use.
   - The font size you want to use.

6. Mark the Make Default box if you want to save these defaults.

   > If you mark the Make Default box, the defaults will be attached to this login. Anyone else who logs in with the same login will see the defaults you set unless they change them in the Options box when they log in.

7. Click **OK**.

   The Horizon Launcher opens: You have successfully logged into Horizon and can now begin using the application.

Navigating the Launcher Environment.

The Horizon user interface is called the Launcher. The Horizon Launcher provides the environment, functionality, and features for all Horizon modules.

Dynix designed the Launcher to be adaptable to the day-to-day workflow at your library. You have a great deal of flexibility in the way you can organize your Launcher and the tools that you can make available by the click of a button. These options are generally set up by your system administrator.

This is the Horizon Launcher:
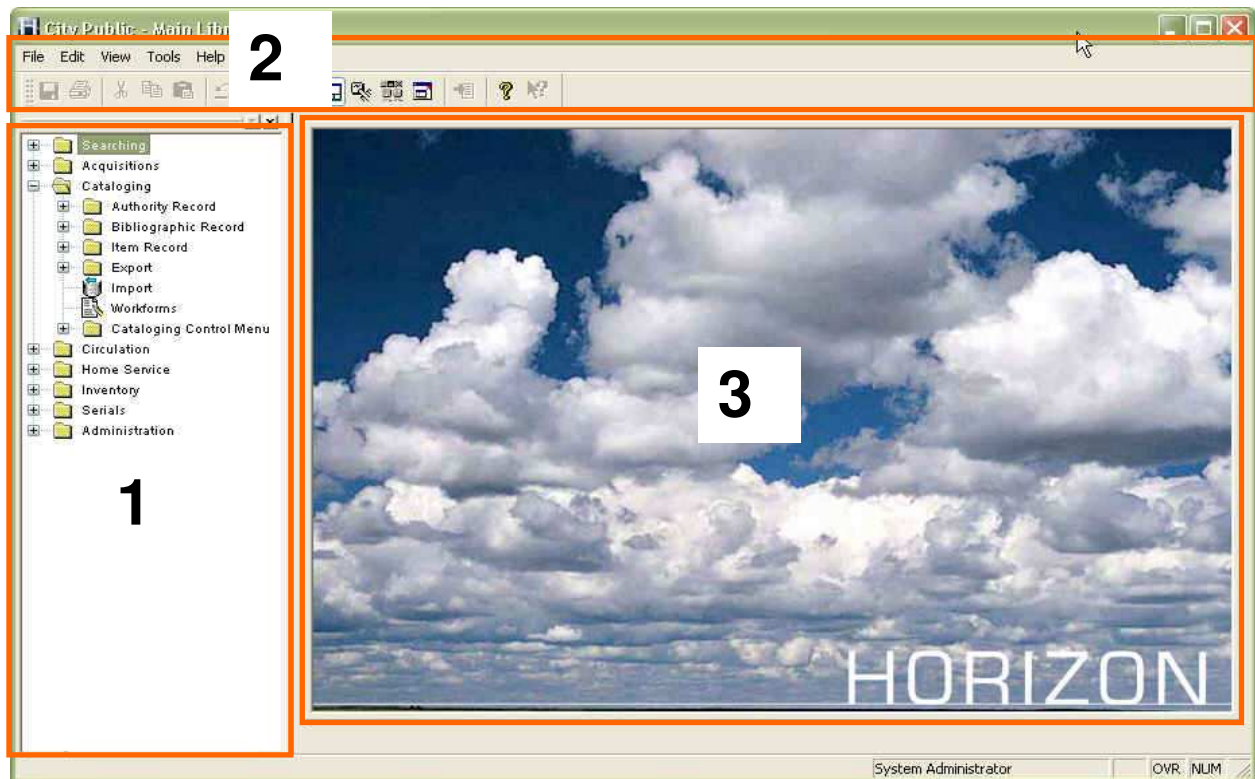
Navigation Bar

The bar on the left is the Navigation Bar (1). You open a folder by clicking on the plus sign (+) next to it. You close a folder by clicking on the negative sign (-) next to it.

Processes on the Navigation Bar are represented by icons. You activate a process by double-clicking on it. Depending on your internal library policies, you may be able to organize and display the processes according to your preferences. You may also be permitted to place third-party applications and/or links to often-used websites in your Navigation Bar. These options, if available to you, are granted by your system administrator.

Menu Bar and Toolbar

The Menu Bar and Tool Bar (2) provide the tools and options that allow you to interact with the open processes.

The Menu Bar is dynamic. In other words, Horizon populates a specific menu with information relative to the active process (window). The other processes that you have open, and what actions you have taken within those windows help determine the availability of menu options and program functions.

The Toolbar comprises a number of buttons, which, when clicked, launch Horizon processes or other applications. Buttons may be displayed in a small format to conserve screen space, or in a large format for ease of use.

By default, Horizon displays buttons with standard Windows features, such as Print, Save, Cut, Copy, Paste, and so forth. Additionally, you can display any Horizon process in the Navigation Bar as a button for greater accessibility. Finally, if permitted at your library, you can create buttons for any third-party applications as well.

The Launcher has the potential to be the interface point with all programs and workflows that you conduct at your computer. Your system administrator controls the full range of the Horizon Launcher's features and functionality.

Workspace

The picture pane area on the right-side of the Launcher is the workspace (3). This is the area where all the Horizon processes (work windows) open. Windows that open in the workspace can be resized, minimized, and shown full-screen to fit your needs.

There is an option on the View menu to keep your Launcher in Workbook mode. It is a good idea to keep your Launcher in Workbook mode because with it you get a tab for every window that is open. This allows you to easily see which windows are open. You can also click on a respective tab to display the desired window to the front and to quickly move between open windows.

Understanding the Dynamic Nature of Menus

In the following step-by-step example, you will see demonstrated the dynamic nature of menu options.

Follow these steps to review the dynamic nature of menus:

1. Open the Checkout window.

2. Click on the Borrower menu to see the options available to you. You notice that you have a limited set of options at this point.

3. Identify a borrower.

4. Click again on the Borrower menu.

   With a borrower identified in Checkout, you have many more menu options available to you. In other words, by identifying the borrower to the system, you have many more menu options to choose from—for example, seeing borrower requests, having access to edit the borrower record, and viewing blocks and payments history information.

Searching for Records

Horizon searching uses indexes that have been created for the bibliographic information in your database. These indexes give you different ways to find information in your database.
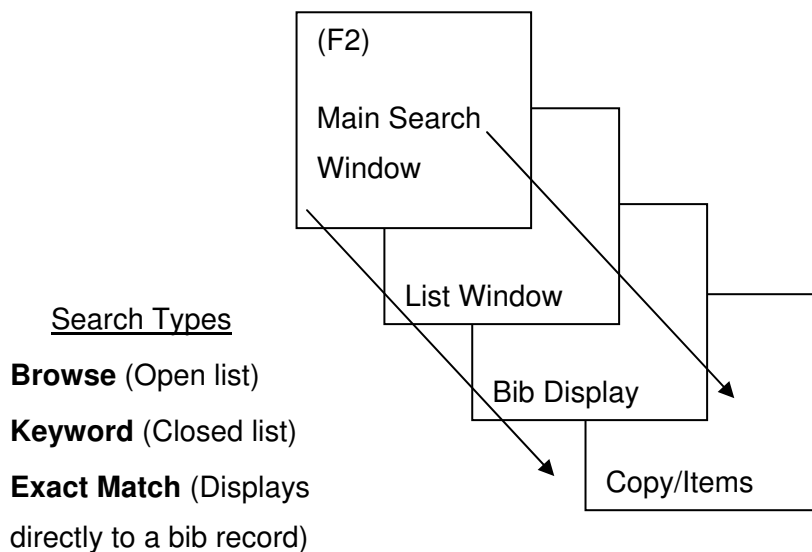
When you set up your production database, your system administrator determines which searches appear on your search menus, as well as their order. Keep in mind that the list of search indexes you see on a training database may be different from the ones on your live database.

There are three kinds of searches in Horizon: keyword searches, browse (or alphabetical) searches, and exact match searches. Keyword searches allow you to search the database for bibs that contain a particular word or words. Browse searches return an alphabetical list of bibs. You are positioned in the list at the word you searched for. Finally, exact match searches return one bib record that matches the search exactly, such as a particular barcode or ISBN number.

The diagram on the following page illustrates the screen progression that occurs when conducting a search. The workflow typically includes four primary screens, but even that may change depending on the type of search you conduct and the results set that is returned from your query.

You will learn about these topics in this section:

- Keyword searches

- Browse (or Alphabetical) searches

- Exact Match searches

```
            ┌─────────────────┐
            │ (F2)            │
            │                 │
            │ Main Search  ──────────┐
            │              ┌──┼──────┼──┐
            │ Window       │  │      │  │
            └──────────────┼──┘      │  │
                           │ List Window │
  Search Types             │      ┌──┼──┼──┐
                           │      │  │  │  │
  Browse (Open list)       │      │ Bib Display │
                           └──────┼──┼──┘  │
  Keyword (Closed list)          │  │     │
                                 │  └─────┼──────┐
  Exact Match (Displays          │        │      │
                                 ▼        │ Copy/Items │
  directly to a bib record)               └──────────────┘
```

Keyword Searches

Keyword searches query the database and return all matches for a certain term. The term can appear anywhere in the MARC tags and subfields that have been mapped to that particular index. Keyword searches are often used when you have general information and are looking for anything that matches.

As an example, a title keyword search might have 245 tag information (title) mapped, 246 tag information (varying form of title), and 520 tag information (summary notes) mapped, as well as others. The search results set that Horizon returns are those records in your database that matched your search term in the associated tags/subfields.

Follow these steps to conduct a title keyword search for the term "sports".

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the Title Keyword search.

4. Enter "sports" in the **Search for:** field.

5. Click **OK**. This screen displays a list of matches, giving basic title, author, and pub date information.

Follow these steps to see the full bib record:

1. Select one of the items on the list.

2. Click **Show Detail**. This screen shows the full bib record.

To see the individual item records (or holdings) records, do the following.

1. Click **Show Copies**. If there were items at this location, they would be located on this screen. Since there are not, you can choose to view copies that are at other locations.

2. Click **All Locations**. This screen shows all of the item records that are attached to this bib. Now that you've seen a sample search, here are some other suggestions for keyword searches on the training database. Feel free to experiment with other searches as well.

    The result screen shows an alphabetical list of subjects. The one you entered, or the one closest to it, will appear third on the list with an arrow pointing to it. The two listed above let you see others that appear near your term.

Browse (Alphabetical) Searches

Alphabetical searches query the database and place you in an alphabetical list at the first instance of the search term. Alphabetical searches are often used when you have specific information (like a specific title or subject). In this case, you want to be positioned in the list according to your entry.

Follow these steps to conduct a title alphabetical search for the term "sports":

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the Title Browse search.

4. Enter "sports" in the **Search for** field.

5. Click **OK**. This screen displays the list of titles in your database with the cursor positioned at the first instance of your search term. If the search term does not exist, you will be at the point in the list (alphabetically) where the entry would normally be found.

Exact Match Searches

Exact match searching lets you search for a bib by its ISBN, an item barcode, or other unique identifier.

Follow these steps to conduct an exact match search:

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the ISBN search.

4. Enter an ISBN number in the **Search for** field.

5. Click **OK**. This screen displays the bibliographic record that matches your ISBN search request exactly.

The Send to Command (F10)

The **Send to** button is located on the button bar at the top of your Launcher. This button (or function command) opens a list window dynamically populated based on your current workflow.

You use the **Send to** button to transfer records from one place to another. For example, you can transfer a record that you have searched for to Cataloging, where you can edit it.

Follow these steps to send a record from PAC to the MARC editor:

1. Search for a record.

2. Display its bibliographic record.

3. Press **F10** to send the item to the MARC editor.

4. Edit the record in the MARC editor.

Bibliographic Records

Your Horizon system stores bibliographic (bib) information in Library of Congress-formatted MARC records. Information is organized into standardized tags and subfields, so it is easily retrievable.

The bib record stores such information as title, author, publisher, ISBN/ISSN, LCCN, subject headings, and so forth. Your bib data is indexed in a number of ways, which lets you search on the data from many different points of reference.

You probably import most of your bibliographic information from a trusted source, such as OCLC, Library of Congress, or BiblioFile. Invariably, you still need to do original cataloging from time to time.

In this manual you will learn additional cataloging skills. These skills will build upon the knowledge you received in your basic cataloging training.

Creating a New Bib

The process to create a new bib record is found on the Navigation bar (Cataloging, Bibliographic Record, Create New Bib). Your system administrator has already created your workforms, and when you create a brand new record you will select the workform that you want to use as a template to create the new bib record.

F o l l o w   t h e s e   s t e p s   t o   c r e a t e   a   n e w   b i b :

1. Select the Create New Bib option from the Cataloging folder (Cataloging, Bibliographic Record, Create New Bib). Horizon displays a window like this one, where you can select the workform you would like to use for creating the new record:

Workforms simplify record creation because their formatting requires a minimum of editing to add a new record to the database.
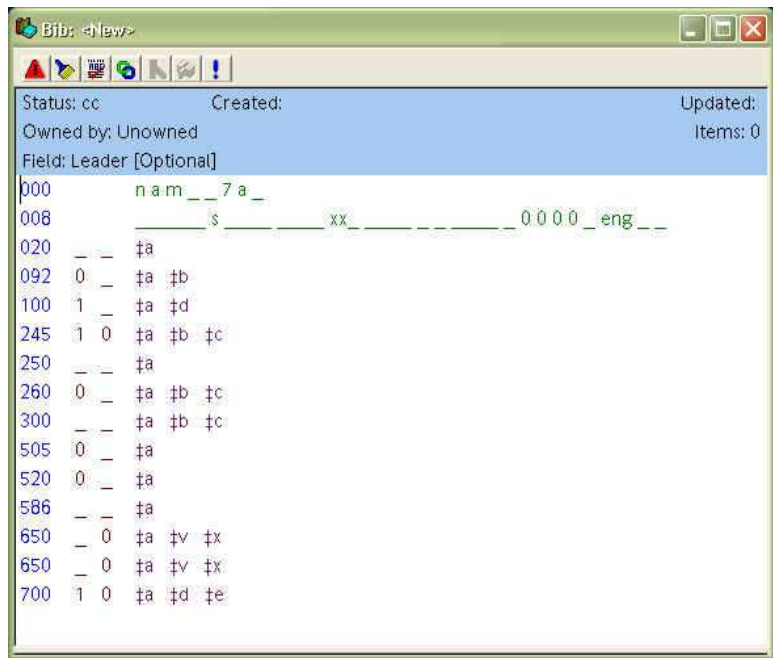

See the Workforms chapter later in this manual for more information on workforms.

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2. Select the desired workform (template) from the list. Depending on your profiling, you may have anywhere from a few to several hundred workforms.

Once you select a workform, Horizon displays a blank MARC record in the MARC Editor:

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3. Add tag, indicator, and subfield information to complete the record.

> With your cursor in the applicable tag or subfield, press **Shift + F1** to connect through your browser to the Library of Congress website, where you will see the tag and subfield information defined. (You must have an Internet connection at the computer you are currently using.)

4. Use options on the View Menu to display the MARC record in the preferred format.

> The commands to edit the record are found on the Edit Menu. You can also access editing commands by doing a right button mouse click anywhere within the MARC Editor. (Menu content is context-sensitive according to the position of the mouse.)

5. Tags that are authority-controlled display in dark blue. When adding data in an authority-controlled field, be sure to use your Browse Link option (**Ctrl + B**) to search your authority catalog and link to existing authorities before adding new ones.

6. When you complete the record, save your changes (**Ctrl + S**) and close.

Merging Bibs

You merge bib records when you want to get rid of one or more bib records and you want associated holdings to transfer to a surviving bib. Merging bib records does not automatically transfer tag and subfield information to the surviving record. You need to copy and paste any bib information into the surviving record before you merge.

> Merging bib records is permanent. You cannot undue a record merge.

Follow these steps to merge bib records:

1. Open the bibs that you want to merge in the MARC Editor. You can merge two or more records. Horizon uses a Surviving/Dying metaphor to identify the record that remains and the record(s) that are deleted.

2. Click on the Merge button at the top of the MARC Editor. (It is the 5th of 7 buttons—looking like two merging train tracks.) Horizon displays the Merge Bib window:

> Horizon assumes that the record displayed to the front of the MARC Editor is the surviving record. If you need to switch the surviving and dying records, simply reselect your option in the Surviving Bib# drop-down window.

3. Click on the **Preview** button if you want to see the merge results before you make the final commitment to merge the records.

4. Press **Merge** to merge the records. Horizon deletes the dying record(s). Horizon does not attempt to reuse or reassign deleted bib numbers.

Using Diacritic Characters

Diacritic characters are symbol characters used in English-language records (like the copyright and trademark symbols) and nonEnglish-language characters and accents marks (like the umlaut, circumflex, and so forth).

Horizon provides a diacritic button bar that you can use to insert diacritic characters into MARC records. Horizon also has a diacritic shortcut bar, listing the keystroke commands that you can use to display to insert the characters into MARC records.

These two diacritic features (Button bar and Shortcut bar) can be sized, displayed, and moved around your Launcher just like the Navigation bar. You access these options from the View menu.

Follow these steps to use diacritic characters:

1. Send a bib record to the MARC Editor.

2. From the View menu, select Diacritic Button Bar. The Diacritic Button bar displays on the Launcher (by default it attaches to the side of the Launcher):

3. Edit the bib record. You insert a diacritic character into the bib record by positioning the cursor to the right of where you want the diacritic character to appear in the record.

4. Click on the desired character to insert it into the bib record.

5. Continue editing the record until it is complete.

6. Click **Ctrl + S** to save the changes.

Using Nonsorting Characters

By default, Horizon sorts records found in a search by nonalphabetical characters first, followed by alphabetical characters from left to right. But you can use special characters in the MARC record to change the sort order for a particular record.

> You can use a nonfiling indicator in the second indicator position of the title field. These indicators determine how many leading characters Horizon ignores when it creates a list that you can browse alphabetically.
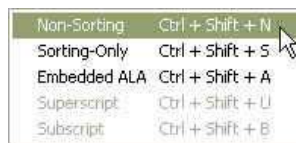
In this section you will learn how to use nonsorting characters in a MARC record. You designate nonsorting characters by placing information inside special delimiter characters. This special syntax affects the way Horizon sorts the information when conducting a search.

In this section we demonstrate adding an author by the last name of MacKay. However, we will enter the name so it sorts with all authors whose last names start with Mc. (In other words, you want Horizon to ignore the "a" character when it sorts in searching.)

Follow these steps to use sorting characters:

1. Open a record in the MARC Editor.

2. Delete the 100 tag.

3. Create a new 100 tag and make MacKay, David S. as the author.

4. Highlight the "a" in the author's last name (M**a**cKay).

5. Select Edit, Insert Delimiters, Non Sorting:

Non-Sorting	Ctrl + Shift + N
Sorting-Only	Ctrl + Shift + S
Embedded ALA	Ctrl + Shift + A
Superscript	Ctrl + Shift + U
Subscript	Ctrl + Shift + B

   Horizon displays double caret symbols in front of and in back of the highlighted character (M<<a>>cKay).

6. Press **Ctrl + S** to save changes to the record.

7. Conduct an author browse search for MacKay and note that the name "MacKay" sorts in the list with the last names that begin with "Mc."
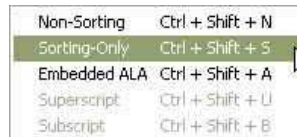
Using Sorting-only Characters

By default, Horizon sorts records found in a search by nonalphabetical characters first, followed by alphabetical characters from left to right. But you can use special characters in the MARC record to change the sort order for a particular record.

You enter sorting-only delimiters around characters or words in a field that you want sorted, but not displayed. For example, suppose you have a title that begins with the number "8". You can have it sort by (but not display) the word "eight." To do this you enter the word "eight" between special delimiters and just in front of the letter "8."

Follow these steps to use sorting characters:

1. Open a record in the MARC Editor.

2. Delete the 245 tag.

3. Create a new 245 tag and enter the title "8 Fat Squirrels".

4. Enter the word "eight" in front of the number "8" and highlight the word.

5. Select Edit, Insert Delimiters, Sorting Only:

Non-Sorting	Ctrl + Shift + N
Sorting-Only	Ctrl + Shift + S
Embedded ALA	Ctrl + Shift + A
Superscript	Ctrl + Shift + U
Subscript	Ctrl + Shift + B

Horizon displays bracket symbols in front of and in back of the highlighted character {eight}.

6. Press **Ctrl + S** to save changes to the record.

7. Conduct a title browse and search for "8 Fat Squirrels." Note hat the title sorts under the word "eight" instead of the numeric "8."

Linking a Bib to a Bib

You can link bib records as defined by MARC cataloging in the 76x through 78X fields. In this section you will learn how to link an original-language record with a translation copy of the same record. For example, linking the English-language Tom Sawyer to the Spanish-language version.

By linking bib records you give your public (your borrowers) additional contact points in their searches. By linking English and Spanish versions of Tom Sawyer, a search for either record displays a link to its counterpart. A person could click on the link and display the other record.

Follow these steps to link bib records:

1. Search for the title, "The Adventures of Tom Sawyer."

2. Send the title to the MARC Editor.

   > In your training database you won't have a Spanish-language version of Tom Sawyer. You will copy the original record and save it as the Spanish-language version.

3. Select File, Copy record.

4. Change the title of the newly created record to "Las Adventuras de Tom Sawyer" and save the record.

   > Make sure the only two windows open in the MARC Editor are the two bib records.

5. Bring the original record to the front and click on the **Link** button at the top of the MARC Editor. (It looks like two links of a chain, blue and green.) A window like the following appears:
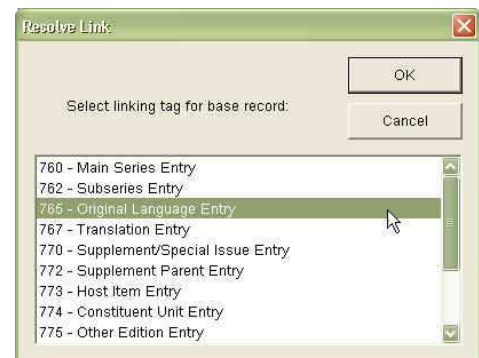
6. Select the 765 tag (Original Language Entry) and click **OK** to insert a 765 tag into the original language record.

Horizon pulls information from the other open record (the Spanish-language translation).

7. Click **Save** to save changes.

8. Click on the Spanish-language record. Note that a 767 tag has been added to that record and Horizon pulled this information from the English-language record.

9. Press **Save** to save changes in that record as well.

10. Search for either record and go to the bib level:

Notice that each of the records has a linked field in its bib display. By clicking on the underlined link, labeled as "translation," you can jump to the other record. This functionality is evident in stafPAC or in HIP searching.

Authority Records

•	Opening an authority record
•	Copying an authority tag or subfield
•	Editing an authority record
•	Adding a new authority record
•	Adding and linking cross references
•	Deleting authority records
•	Merging authority records
•	Clearing authority tables

There are certain tags and subfields in a MARC record that are used for searching. It is important to maintain organization and uniformity in these tags and subfields so library users can find records with greater facility.

Horizon controls these tags and subfields according to MARC standards; these special parts of the MARC record are called "authority-controlled" tags and subfields.

Horizon stores each authority-controlled tag (with appropriate subfields) in a separate MARC record called an authority record. Only one authority record should exist for each authority entry. The authority record is then linked to all bibliographic records that display information that the authority record contains. You can also link authority records to other authority records.

Horizon stores authority records separately from bib records, and you maintain the records separately. Sometimes Horizon creates authority records automatically; these are called "system-generated" authorities. Other times you import new authority records when you bring new bib information into your database from a source such as OCLC or Library of Congress.

Opening an Authority Record

When you add records to your catalog (manually or automatically by importing), Horizon assigns each record a sequential number. Horizon displays this unique number in the upper left-hand portion of the authority record. If you know this number, you can use your searching options to access and display a specific authority record.

Follow these steps to open an authority record:

1. Select the Auth# Lookup process (Navigation bar, Cataloging, Authority Record, Auth# Lookup).

2. Enter the authority number for the record that you want to display. The system displays the authority record in the MARC Editor.

   > If you do not know the number of the authority record that you want to display, you can search for the record and send it across to the MARC Editor.

Follow these steps to search for an authority record and send it across to the MARC Editor:

1. Search for an authority record.

   > When you select records from a search index that displays authority records—for example, when you conduct a search like author browse, subject browse, or series browse—you are selecting authority records to send into the MARC Editor.

2. Send the record to the MARC Editor (use the **F10** command or click on the **Send to** button). Horizon displays the authority record in the MARC Editor.

3. Make any changes to the record in the MARC Editor. Be aware that the tag and subfield assignments in the authority record are different from the assignments in a bibliographic record.

4. Click **Ctrl + S** to save the changes made in the MARC Editor.

Copying an Authority Tag or Subfield

There are several ways to copy a tag or subfield in an authority-controlled field. If you are copying information from one record to another in the MARC Editor, you can simply copy and paste between the records (or select and drag information from one record and "drop" it into another record).

In this training you will learn how to copy a tag (and subfield information) using the copy and paste commands.

Follow these steps to copy authority tag or subfield information from one record to another:

1. Open two bib records and send them to the MARC Editor.

2. Select the 650 tag information from one record and copy it. (If the bib record does not have 650 tag information, create a 650 tag and link it to an existing subject authority.)

3. Paste the 650 tag information into the second record.

4. Save the changes to the record.

> You can use the Window, Tile Vertically option to display two records side by side in the MARC Editor. When you have records displayed side by side, you can highlight information from one record and "drag and drop" the information into the other record. Dragging and dropping is a Windows convention, and simply another way to copy information between records.
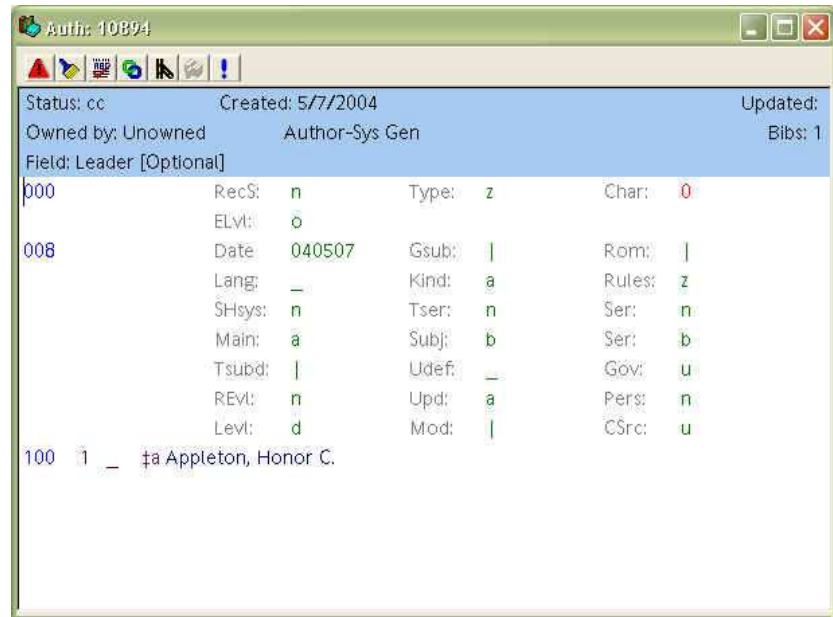
Editing an Authority Record

You edit authority records in the MARC Editor, just as you do bibliographic records. The editing tools, options, and procedures are essentially the same, no matter the type of record you are updating.

Follow these steps edit an authority record:

1. Open an authority record in the MARC Editor. The record looks similar to this:

2. Use standard editing commands to edit the record. The same shortcut key commands and options available for editing bib records apply.

Refer to the Edit menu for editing command options. You can also use the right mouse button to display context-sensitive options, depending on the cursor position at the time of mouse click.

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3. Press **Ctrl + S** to save any changes to the record.
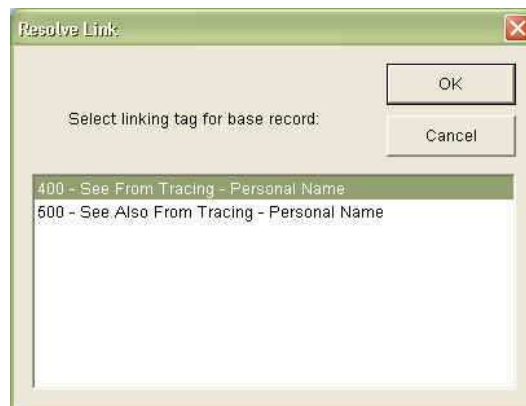
Adding Cross-References

Cross-references help users find titles related to direct searches. You can create cross-references at any time or delete cross-references that you no longer want. Your system administrator can determine which tags can be cross-referenced and whether those cross-references are reciprocal (are linked both ways).

Horizon automatically creates a See Also reference in your database when you import an authority that has a See Also reference. If no authority exists that matches the incoming See Also reference, Horizon creates a system-generated one.

If you import an authority record that has a See Also reference that matches an authority in your database (and that authority is not system-generated), Horizon creates a See Also reference to that authority, but not a reciprocal link. This prevents See Also references that should not exist.

Follow these steps to manually add a cross reference authority records:

1. Open the two authority records that you want to work with to create the cross reference.

2. Select the authority record that you want to be the primary record. (Horizon identifies the record that is highlighted or displayed to the front as the primary record.)

3. Click on the Link icon in the MARC Editor toolbar. Horizon displays a window like this:

4. Select the 400 (tag) option to create a See reference; select the 500 (tag) option to create a See Also reference.

5. Enter the cross-reference term into the respective tag (400 or 500).

6. Enter **Ctrl + S** to save changes to the record.

You can manually add a See or a See Also reference to an authority record by simply inserting the appropriate tag and linking information into the authority record and then saving the changes.

When you have successfully created a See or a See Also cross-reference, it will immediately display in your searching. In this example you see how Horizon displays a cross-reference link from Mark Twain to Samuel Clemens:
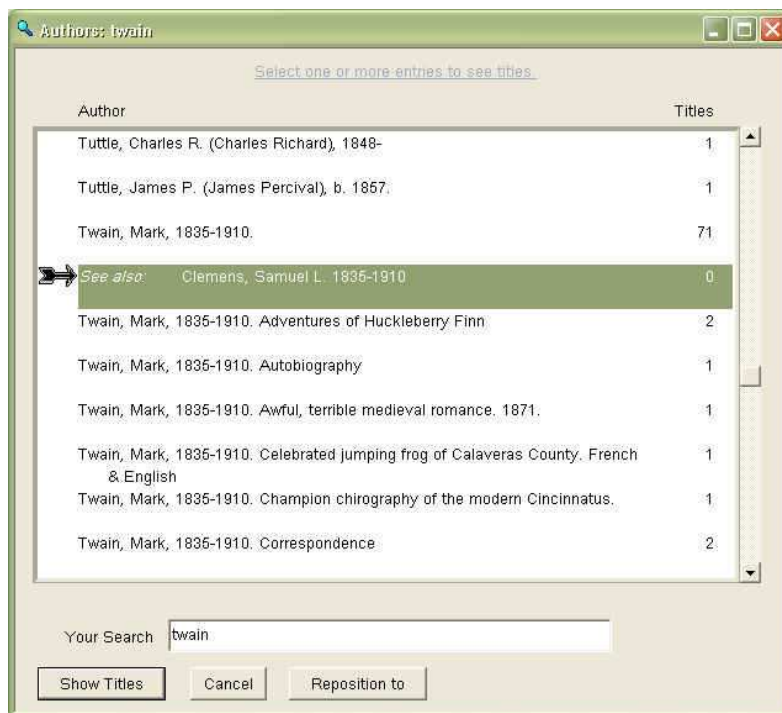

Notice the **Reposition to** button. Clicking on this button repositions you in the author list to the cross-referenced entry.

Deleting Authority Tags and Records

You can delete an authority record only if there are no bibliographic records attached to it. If you want to delete an authority record and it has bibs attached to it, you must search for all bib records containing that authority and delete the authority tag from the respective bib records, and then you will be able to delete the authority record.

Follow these steps to delete an authority record:

1. Open the authority record that you want to delete.

2. Choose File, Delete Record. Horizon prompts you to verify you want to delete the record:
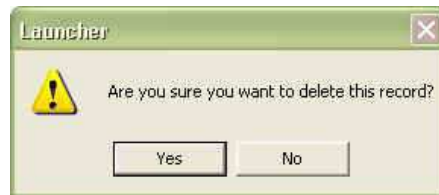
3. Click **Yes** to verify you want to delete the authority record.

4. Horizon deletes the authority record and "throws away" the number it used to identify the record. (In other words, Horizon does not attempt to reuse numbers that were previously assigned to authorities.)

Merging Authority Records

You merge authority records when you find redundant, duplicate, or errant information in your authority catalog. Merging authorities cleans up your searching displays and assists your borrowers in their efforts to quickly locate items.

Merging Authority records is permanent. You cannot undue a record merge.

Follow these steps to merge authority records:

1. Send the two authority records that you want to merge to the MARC Editor.

2. Click on the Merge icon in the MARC Editor toolbar. Horizon displays a window like this:

Horizon uses the terms "Surviving Auth" and "Dying Record(s)" to distinguish between the record being kept and the record(s) being deleted. All bibs referencing the dying records will display the surviving authority.

You can use the **Preview** button to display how the merge will leave the record. This is a nice feature to "preview" the result before you actually commit to the merge.

3. Click **Merge** to merge the records.

Horizon deletes the dying records and references the surviving authority on all associated bib records. You can conduct a search on any affected bib to verify results.
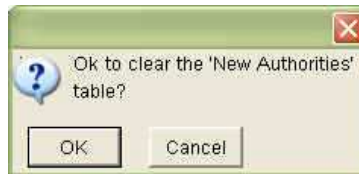
Clearing the Authority Table

Horizon keeps track of all new authorities added to the system, whether author, subject, or series. These new authorities are displayed in separate windows located in the New Additions folder (Navigation bar, Searching).

Horizon provides a process to clear the authority tables when the information in them becomes too extensive for quick access. The Clear New Auth Table option is found in the Navigation bar (Cataloging, Authority Records). Running this process clears all three tables.

Follow these steps to clear the authority table:

1. Navigate to the Clear New Auth Table process and open it up. A window like this one appears:

2. Click **OK** to clear the Authorities tables.

   Clearing the tables is an "all or nothing" endeavor. There is no way to clear one or two tables and leave the other(s) populated. Horizon clears new titles automatically based on a setting in the Matham table.

   Horizon clears the tables and the system begins tracking new authorities added to the system afresh.

Item Records

In This Section Learn About:

•	Printing cataloging labels
•	Batch deleting item records
•	Batch creating item records

Each bibliographic record contains information describing a certain title, but you must also have an item record to identify each individual item (holding) in your system.

Each item record in your database receives a unique barcode, identifying the item from every other item in the library. Horizon uses the barcode to identify and keep track of all items that your borrowers are using. Horizon also builds statistical data on each item so you can see how your library is being used.

You can have bibliographic records in your system with no item records attached to them; you *cannot* have an item record unless you have a bibliographic record to attach it to. In other words, item records attach to bib records.

If you merge bibliographic records, all item records are attached to the surviving bib. You cannot delete a bib record unless you first detach or delete the item records that are attached to it. You cannot delete item records that have certain (unresolved) statuses. For example, you cannot delete an item that has a status of "checked out" or "item being held."

When you add item records to your database, Horizon provides you the tools to create and print cataloging (spine and book cover) labels to identify the items on the shelf. You can print spine labels individually or in a batch setting.

Printing Cataloging Labels for an Individual Item

You can print cataloging labels such as card and spine labels for a single item or for multiple titles from the List Items dialog box in Cataloging. You can also print cataloging labels if you know the barcode numbers of the items for which you want to print labels.

> Printing spine labels assumes several points of profiling setup to work properly. During Implementation, your system administrator works with your library consultant to make sure your profiling has been properly communicated and entered into Horizon.

Follow these steps to print a cataloging label for a single item:

1. Display the item that needs cataloging in the Copy/Item List window. It looks similar to this:

2. Select the item from the Copy/Item List window that you want to print.

3. From the Menu Bar, select Items, Print Spine Labels. Horizon displays a Code Lookup—Label Export window.

4. Select the desired line from the window and click **OK** to select the proper printing action. A window like the following appears:
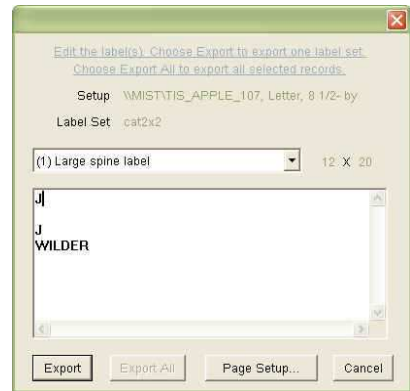
The Print Label Format window is an editable window. You can edit the information in the window if it for some reason is not displaying as you would like. The drop-down box in this window lets you individually see each label in a multi-label set.

A predefined label set is defaulted (as is the spine breaker used). Designating another label set (or spine breaker) is an administrative task.

5. Edit the label if necessary.

6. Click **Export** to send the label set to the printer.

7. You can exit from this feature or select another item record if you need to print additional labels.

Printing Cataloging Labels for Multiple Items

When you print cataloging labels for multiple items, you use the Batch Print Spine Label process. Its default position on the Navigation Bar is inside the Cataloging, Item Record, Batch Print Spine Label.

The typical workflow is to catalog many records and have them together in one place or on a cart. When finished cataloging the records, you are ready to print the spine labels as a last step before making them available for circulation. You can now print out the spine labels in batch fashion, regardless of their format, collection, library location, or shelf location.

> Printing spine labels assumes several points of profiling setup to work properly. During Implementation, your system administrator works with your library consultant to make sure your profiling has been properly communicated and entered into Horizon.

Follow these steps to print cataloging labels for a multiple items:

1. Click on the Batch Print Spine Label option (Navigation Bar, Cataloging, Item Record). The Code Lookup—Label Export window appears.

2. Select the desired line from the window and click **OK** to select the proper printing action. A window like the following appears:

This window is simply a place to scan in the item barcode.

3. Scan in the barcode for the first item. Horizon gives an audible signal to indicate a successful identification of the record and displays the print label window shown in the previous section. This window is editable.

4. Review the label information, if necessary, and click **Export** to send the label set to the printer. The barcode window reappears.

5. Repeat steps 3 and 4 for as many items as you have to print.

Batch Item Deleting

Horizon provides you with a convenient way to batch delete item records. You can use this tool in many circumstances, but it was designed primarily for those times when you need to weed multiple item records from your system.

You can set up profiling in the Item_Delete_Options table in the MARC Editor to determine how Horizon deals with situations where the item you are deleting is the last item attached to a bib. (For example, you can delete the bib as well if the item deletion is the last item attached to the bib.)

Follow these steps to batch delete item records:

1. Open the Batch Item Delete process (Navigation Bar, Cataloging, Item Record). Horizon displays a window similar to this one:
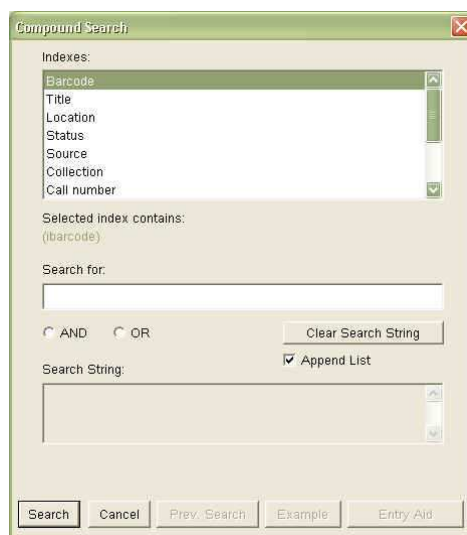
Notice that the default index selected is barcode. The Append List checkbox is also populated with a checkmark. This means the window will remain open and the list will build as you scan in barcodes.

2. Scan in the barcodes from the items you are deleting from the system. As you scan in a barcode, the compound search window "blinks" and then redisplays, awaiting the next barcode. The list of items to be deleted builds in the Batch Item Delete List window behind the Compound Search window.

> You can also populate the Batch Item Delete window by using the other options in the Compound Search window, or by using the **Send to** command to send items from the Copy/Item List or from PAC (Searching) at the item level.

3. When you have scanned in all your item barcodes, click the **X** in the upper right-hand corner of the Compound Search window. The Compound Search window closes.

4. Press **Ctrl + A** to select all the items in the list.

5. Press **Delete**. Horizon displays a window like this one:
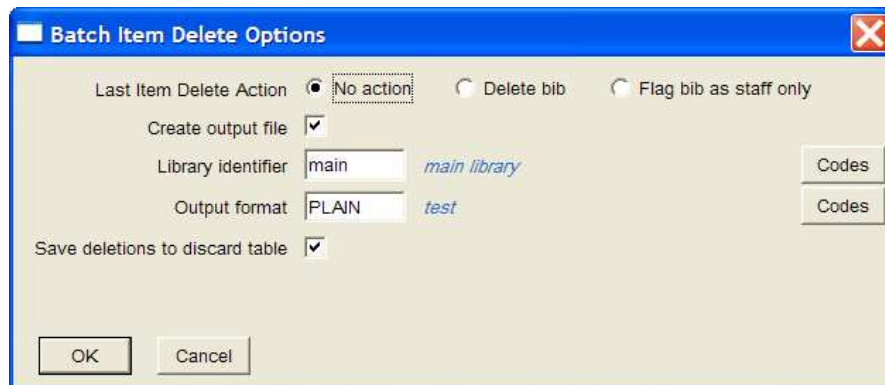
You can choose from these options for last item deletion:

- No action. Leaves the bib in the system
- Delete bib. Removes the bib from the system
- Flag bib to staff only. Flags bib to staff only, no longer searchable in PAC
- Create Output File. Creates a file containing the deleted items.
- Library Identifier and Output format. These settings are established in the settings created in the table editor and are part of the output file.
- Save deletions to discard table. Ff this is *not* selected then the Report and Purge Discarded Items menu option will not be usable. This setting is also defaulted in the table editor, but can be changed at the time of the delete.

6. Click **OK** and Horizon deletes the referenced items from the system.

Purge Discarded Items Report

Horizon provides a report feature that you use to purge discarded items. You can use it immediately following a batch deletion. (You can enter an asterisk [*] in the search window to bring up all the items currently in the discard table.) You can also identify Items using the various indexes available.

Follow these steps to list those items that were deleted from your database and the action that was taken at the time of deletion:

1. Select the Report and Purge Discarded Items option from the Navigation bar (Cataloging, Item Record, Report and Purge Discarded Items). Horizon displays a report similar to this one:
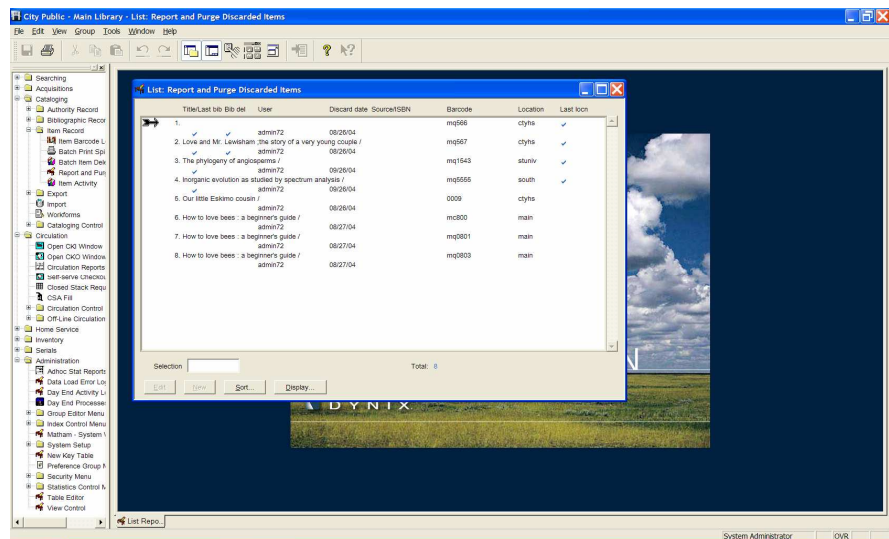
This report displays this information:

- If an item was the last item deleted.

- The bib action Horizon took at the time of deletion.

- If this was the last item at a location

Items remain on the report until they are "purged" by selecting the item(s) and selecting File> delete record.

2. To purge an item from the list, highlight it (or multi-select from the list to batch delete), and select File, Delete Record.

3. Press **Esc** (or File, Close) to lose the Report when you are finished.

Batch Creating Item Records

You can create item records one at a time or automatically by batch. In this section you will learn how to create multiple item records with the click of a button.

Follow these steps to create item records in a batch:

1. Display the desired item record in the Copy/Item List window:
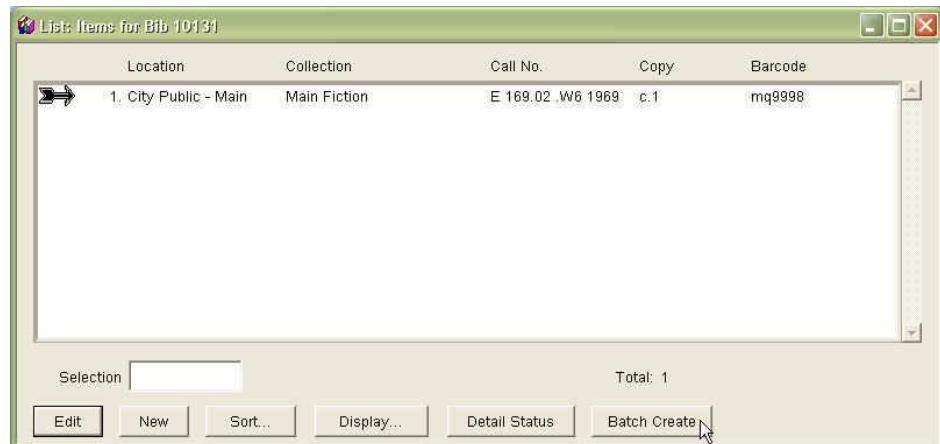
2. Click **Batch Create**. Horizon displays a window like this one:

3. Enter a prefix into the Copy# field, if applicable.

4. Enter the number of copies that you want. In our example we put a "2" in the From# field and an "8" in the To# fields. This indicates that we want to create 7 additional copies—2 through 8.

5. Click **OK** to batch create the desired copies.

> You can use the Volume# group to automatically create copy records for multiple volume sets. The Barcode# group lets you preassign barcode numbers to the items, if you are profiled to do that. Contact your library consultant for more information.

You will see a counter display as the records are batch created. Horizon notifies you of any errors in creating the new records.

6. If you need to access any of the new item records and edit them, you may do so individually, or in a batch. For example, if you were adding a valid barcode to each item, you can do that one item or a time, or you can edit all items at once.

Workforms

In This Section Learn About:

•	Updating a workform
•	Using a workform

Think of your cataloging workforms as templates for the different types of records that you catalog. You use a workform to create a bibliographic record from scratch. You can have as many or as few workforms in Horizon as comfortably fits your typical workflow.

When you create a bib record you select your workform from a list. The workform determines the tags, indicators, and subfields that appear on a bib record and in what order. As an example, you might want to create unique workforms for different media types such as DVDs, Videos, and books.

Some libraries use workforms to streamline the process of manually adding records by defaulting information into subfields. For example, you might create separate workforms for books received from your different sources (suppliers). The source is defaulted into the record to simplify data entry.

Your system administrator usually sets up your workforms and to reflect your specific needs. The tool to create additional workforms, or to change existing ones, is a system administration feature.
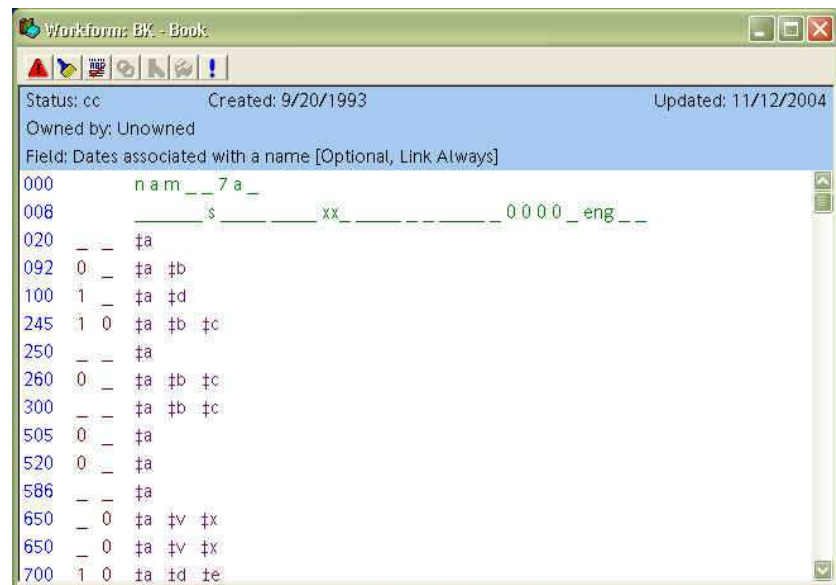
Updating a Workform

Horizon provides a Workform process in the Cataloging folder to create a new workform or edit an existing one. Once your workforms are created, your system administrator will probably remove the Workform process from the Cataloging folder.

Follow these steps to update a workform:

1. Open the Workform process in the Navigation bar. Horizon displays a screen like the following:
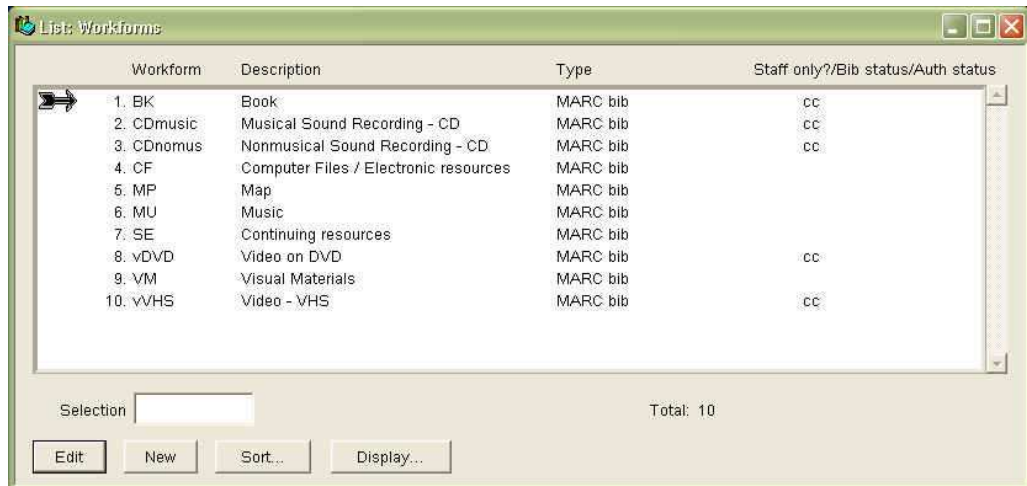
2. Select the desired workform from the list. Horizon displays the workform:

> The Workform window looks just like the MARC Editor window. Horizon identifies the window as being a workform, but you will need to be careful when working with workforms because it is easy visually to confuse the two windows.

3. You can edit this workform to meet your preferences. The way you leave the workform is the way all new records created from it open up (display). Your security settings determine which tags, indicators and subfields you can edit when you create the new bib record.

4. Press **Ctrl + S** to save your changes.

5. Close the record to complete this task.

Using a Workform (to Create a new Bib)

For those circumstances where you do original cataloging, you will use the Create New Bib process (Navigation bar, Cataloging, Create New Bib).

Follow these steps to use a workform to create a new bib:

1. Access the Create New Bib option to create a new bib record (Navigation bar, Cataloging, Bibliographic record, Create New Bib). Horizon displays the Code Lookup: Bib Workforms window:
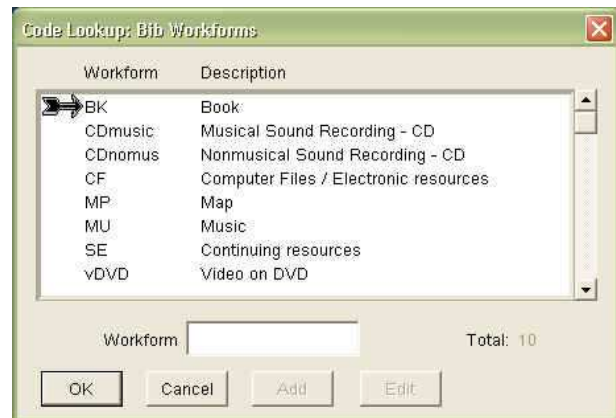
> You are selecting a workform from your list of approved workforms at this point. Do not confuse this workflow with creating a workform.

2. Select the desired workform and press **OK**. Horizon displays an empty bib record in the MARC Editor.

3. Fill in the new record by entering information into the desired fields.

> Editing options are available from the Edit menu or with a right mouse click inside the MARC Editor. These options are context sensitive from the current cursor position.

4. Enter **Ctrl + Save** to save your changes. Horizon strips all empty tag and subfield information from the new record and saves it into your database. Horizon immediately indexes the new record. You can perform a search and access the newly created record.

5. Close the record to complete this task.

Reports

In This Section Learn About:

•	Item reports
•	Ad Hoc reports

Item Reports is a report-generation tool that is available from the Table Editor. As the name implies, the tool queries the database and returns information from the item level of cataloging.

Add Hoc Reports is a set of "canned" reports that have been set up to run from the Administration menu. Your Ad Hoc Reports delivers a few standard reports, giving you statistical information about how your library is being used. You can run the report for one or any combination of locations. You can send the report directly to a printer or save it to your computer
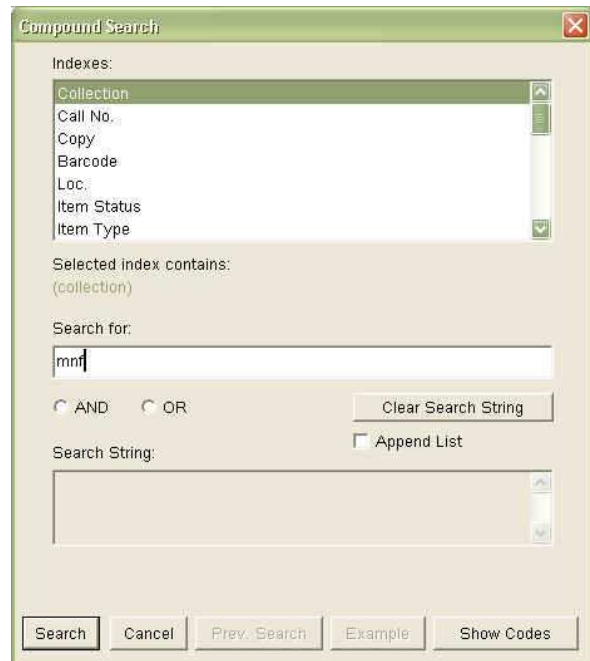
Many libraries break Item Reports and/or Ad Hoc Reports out as a separate process in the Navigation bar and locate it in the Cataloging folder (or some other place), making it available to library staff that do not have access to the Administration folder in Horizon.

Using Item Reports

You use Item Reports to generate item-specific information from your Horizon database. Item Reports is a nice tool to search your database and pull out lists of records that meet your search criteria.

Follow these steps to use Item Reports:

1. From the Table Editor enter "item_reports" to access this reporting tool. Item Reports is often displayed as a stand-alone process in the Navigation Bar. A screen like the following appears:

Item Reports gives you many options to choose from in the Indexes window. You can use the And and Or radio buttons to perform searches on more than one column in the item table. (For example, you can search for items that belong to a certain location AND which have a specific item status.)

The Append List radio button, when checked, keeps the Compound Search window open so different searches continue to build the desired list in the Item Reports window (set behind the Compound Search window). When you have compiled your list, simply click on the red checkbox in the upper right-hand corner of the Compound Search window to close it.

The Compound Search window, if it gets dismissed, can be redisplayed by pressing **Alt + F2**.

2. Select an index from the window and enter a search term in the Search for field. Horizon displays the Item Report window, which contains a list of items that matched your entry. It looks similar to this:

In the screen print example above, the Item Report is showing all items that belong to the Main Non-fiction collection.

3. If you'd like to, you can use the **Sort** and **Display** buttons to format the report for printing.

4. Press the Print icon on the Button Bar (or File, Print) to send the report to the printer.

5. Use the printed report to retrieve items from the shelf, weed books from your database, or other intended task.

Using Ad Hoc Reports

Ad Hoc Statistical Reports is a limited list of standard reports, each of which is set to report on the same statistical categories each time it are run. You cannot customize or adjust the reports; rather, they are what they are.

You access Ad Hoc Reports from an established list that you access through the Ad Hoc Reports process in the Navigation bar.

Follow these steps to use Item Reports:

1. Double click on the Ad Hoc Reports process in the Navigation bar. A screen like the following appears:

2. Select a location or locations from the Locations window. In the above example, the Main Library location is selected.

3. Select the desired report from the Report Type window. Notice that you can also change the date desired for the report you are going to run. (You can rerun the report for a date in the past.)

4. Click **Print** to send the report directly to the printer. Notice that you can also click **Save to File** to save the file to a floppy drive or to your computer hard drive.

> Some libraries save certain reports to file so they can open the report in Microsoft Excel or Word later on. This also allows you to edit the report (which you cannot do in Horizon).

Training Exercises

These training exercises will help you practice the skills you learned in Horizon Intermediate Cataloging Training. Follow the instructions in this section to review the things you've learned and to practice your skills.

1. Grab a book at your library and search for the title to make sure it doesn't already exist in your training database.

2. Create a new bib using the Book workform and save the record.

3. Conduct a search for the title and see that it is available through searching.

4. Copy the bib you just created to make a second bib. Copy information between the two records. Practice editing the records. Save the records.

5. Link the two bib records (Optional—these are 76x to 78x tags; press **Shift + F1** in the MARC Editor to go to the Library of Congress web site and learn more about these tags).

6. Search by author, subject, or series to a list screen. Send an authority record to the MARC Editor.

7. Duplicate the authority record and change the authority in the new record so it is different from the original, then save the new record.

8. Create See Also references for the two records.

9. Check the new authorities tables (Navigation bar, searching) to review how that information is displayed in Horizon.

10. Merge the two authorities.

11. From the Copy/Item List window, access an item record.

12. Print cataloging labels (spine labels) for the item.

13. Create another item record from the first record.

14. Batch create 3 or 4 other records.

15. Delete the item records that you just created.

16. Open Item Reports and select the criteria that you want in order to retrieve item information from your database.

17. Open Ad Hoc Reports and print out a Daily Circulation Details report.